Department of Education
Office of Student Financial Assistance

Deliverable 31.2.12 Delivery Support

July 19, 2001

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1. Executive Summary

Student Aid Front 2 Back is the third in a series of core curriculum courses offered by SFA University. The purpose of the course is to help SFA employees and Operating Partners gain a better understanding of the process a student goes through when applying for financial aid, the role of the other “players” in the financial aid industry (Schools, Lenders, Guarantors), and how they interact with one another in support of the student. Additionally, SFA employees and Operating Partners will learn more about the measurements that are being used by SFA to evaluate and improve SFA’s support of the student financial aid process.

A critical element of any successful training program is documenting how the course was created and implemented to benefit future courses. For Front 2 Back, this involves capturing how all the different processes were implemented.

2. Front 2 Back Process Descriptions

This document represents what happened for each process area during the development of Front 2 Back. Each process has been broken down into four areas. They are:

Process Description

At the beginning of each section, the process is described. This narrative provides a general introduction to the process, why it was important to Front 2 Back, and some background on the steps taken to achieve project goals.

Team Member List

The names of those who participated in a process area are included in each section. This allows future users of this document to contact these individuals for further, more detailed information, as needed.

Process Flow

Where appropriate, a process flow provides a visual depiction of the process. These flows are in chronological order and include the major steps in the process.

Process Step Description

For each major step depicted in the process flow, a description provides more detail and context to the events in that area.

Course Development

Design

Rigorous instructional design is one of the most important factors in creating an effective and successful training course. It is necessary to employ a thorough and well-considered design process. In Front 2 Back, the design process included content definition, storyboarding, activity creation, and numerous design meetings. A more detailed description of the steps in the design process is included below.

Team Members:

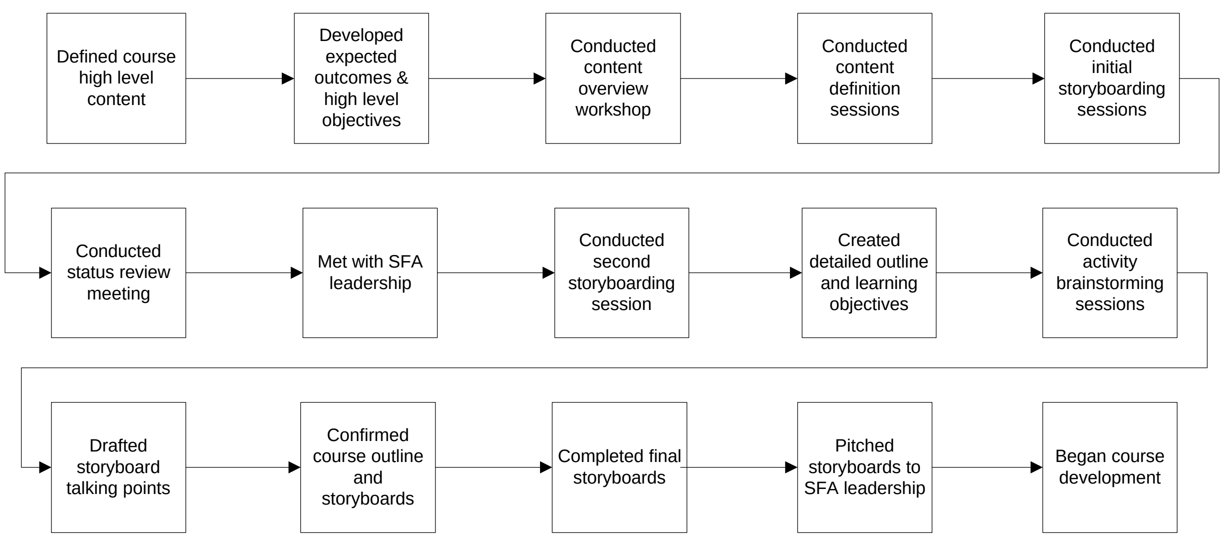
SFA
- Sarah Babson
- Steven Blair
- Pat Reese

Accenture
- Susan Gottlieb
- Katie Malague
- Laura Miller
- Michael Ungari

PSG
- Michael Donnelly
- Jeff Kober

ACS
- Lynette Cameron

Design Process Flow



Process Steps

<u>Defined high level course content</u> – Design team members met with the Chief Operating Officer (COO) and Chief of Staff (COS) to determine what topics should be covered in the course.

Developed expected outcomes & high level objectives – Once the high-level course content was determined, the team discussed intended outcomes and high-level course objectives.

Conducted content overview workshop – A few members of the design team researched the basic course content and created a workshop that provided an overview of what would be included in Front 2 Back. This ensured that members on the team started the design process with a similar level of content knowledge.

Conducted content definition session – After the initial content overview workshop, a number of sessions were held to determine the level of detail for the course content.

Conducted initial storyboarding sessions – The initial storyboarding sessions consisted of 2 days of brainstorming, including a trip to the Smithsonian. During the sessions many ideas were generated, but the team decided that a clearer idea of the course content was needed in order to complete the design.

Conducted status review meeting – During the status review meeting, the design team decided how to proceed after the storyboarding sessions. The team held several discussions on conceptual models and how to organize the course content. The team decided to seek guidance from leadership on the direction of the course.

Met with SFA leadership – Several members of the design team met with the SFA's Chief of Staff to discuss the direction of the course. During the sessions the team presented high level models on how to organize course content. While encouraged by the progress the design team had made with the course design, the Chief of Staff offered suggestions for the focus of the design.

Conducted second storyboarding session – Aided by comments from the Chief of Staff and work done since the initial storyboarding session, the design team held the second set of storyboarding sessions. This time, while the storyboards were not completely finished, the team established a firm direction for the course. At the end of these sessions, a subgroup of the design team completed the storyboards. The entire team then reviewed the completed product.

Created detailed outline and learning objectives – Based on the storyboards, a subgroup of the design team created a detailed outline including learning objectives to solidify the design.

Conducted activity brainstorming session – After the second storyboarding session, the team built upon its general ideas about course activities and the sequence of the course by discussing specific activities. Using the detailed course outline and learning objectives, the design team conducted a brainstorming session to create ideas.

Drafted storyboard talking points – To begin the development phase of the course, the final course storyboards and design had to be approved by the COO. Talking points were developed for the main presenter to effectively pitch the storyboards. These included a brief description of each storyboard and an explanation of the activity or learning intent.

Confirmed course outline and storyboards – The design team met to finalize the storyboards before the final pitch to the COO. This also served as an opportunity for the presenter to practice the storyboard pitch.

Completed final storyboards – Team members adjusted the storyboards, based on the confirmation meeting.

Pitched storyboards to SFA leadership – Design team representatives attended the storyboard pitch to leadership. A single presenter pitched the storyboards to the COO. The audience was encouraged to ask questions once the presentation was finished. After the question and answer period, the COO provided comments on the design.

Began course development – Using the storyboards, course outline, learning objectives and COO comments, course development began.

Development

Course development builds on the foundation of course design. To develop a valued training course, a development team elaborates upon the design and moves toward delivery.

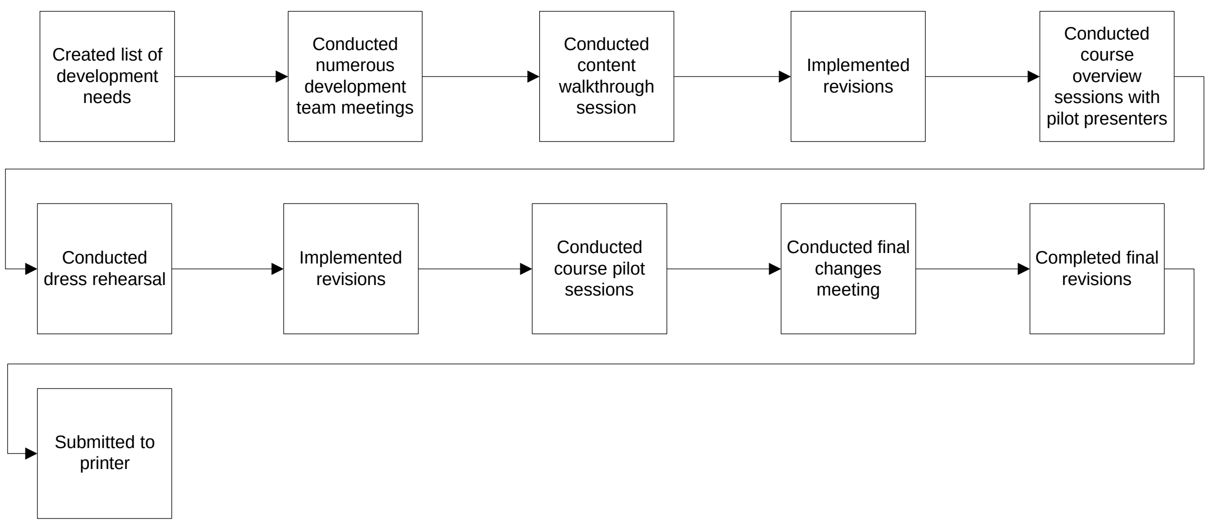
In Front 2 Back, the development process included outline development, course materials design, materials revision, and dress rehearsal and pilot sessions. A more detailed description of the steps in the development process is included below.

Key Participants:

Accenture

- Susan Gottlieb
- Katie Malague
- Laura Miller
- Michael Ungari

Development Process Flow



Process Steps

<u>Created list of development needs</u> – Upon completion of the design process, the development team created a detailed course outline that included materials needed for the course. The development needs included materials production, activity design, slide creation, and others for each course section.

<u>Conducted numerous development team meetings</u> – The team met daily to discuss progress of other team members for approximately 2 months of development. These meetings aligned efforts and coordinated development.

Conducted content walkthrough session – Once the first draft of the course materials was complete, original design team members and major stakeholders met to evaluate the level of content for the course.

Implemented revisions – After the content walkthrough, the development team implemented revisions based on the comments of the key stakeholders and design team. The materials were intended for use in the dress rehearsal and course pilot.

Conducted course overview sessions with pilot presenters – To prepare the pilot presenters, the development team briefed the presenters on course content, materials, and presentation.

Conducted dress rehearsal – The pilot presenters practiced the course in front of a live audience.

Implemented revisions – During the overview sessions, the pilot presenters requested changes to course materials. These edits were incorporated prior to the pilot.

Conducted course pilot sessions – Pilot sessions demonstrated the strength or weakness of course activities and materials. Participants completed course evaluations that offered additional insight for revisions.

Conducted final changes meeting – After completion of the pilot sessions, a subdivision of the design team met to assess what changes had to be made before the final materials were sent to the printer.

Completed final revisions – For 3 weeks following the final revisions meeting, the development team worked on final revisions to the course materials.

Submitted to printer – The course materials were finished and submitted to the printer. After this date, no further changes were made to the course materials.

Dress Rehearsal

A dress rehearsal session helps produce a successful pilot. During the dress rehearsal, the pilot presenters become more comfortable with the course content in a safe environment. The practice gained during the dress rehearsal allows presenters to better anticipate audience questions and reactions to the course materials. As a result, the pilot evaluations yield more valuable comments.

In Front 2 Back, the dress rehearsal process included selecting participants, securing course materials, recruiting a logistics coordinator, and gathering feedback. A more detailed description of the steps involved in creating the dress rehearsal is included below.

Team Members:

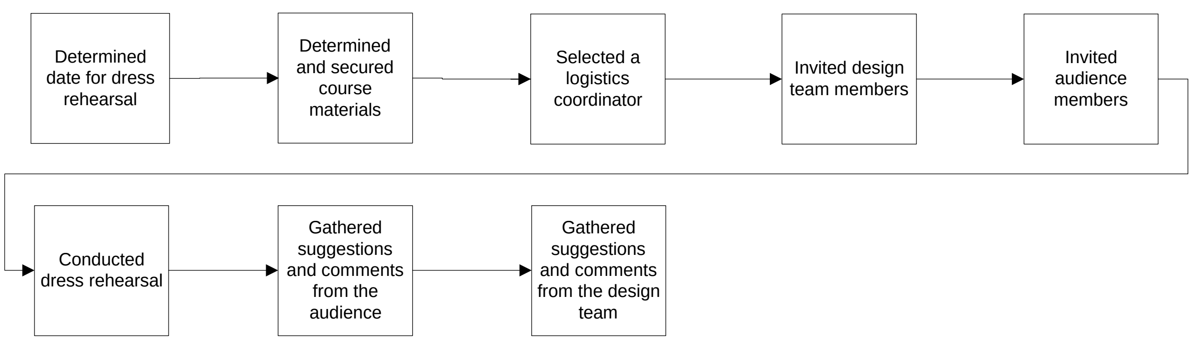
SFA

- Sarah Babson
- Pat Reese

Accenture

- Daniel Boulton
- Laura Miller

Dress Rehearsal Process Flow



Process Steps

<u>Determined date for dress rehearsal</u> – The team decided to conduct the dress rehearsal the week before the pilot sessions. This allowed presenters to practice the course immediately before delivering the pilot sessions.

<u>Determined and secured course materials</u> – The materials for the dress rehearsal were identical to those used for the pilots, but copies of the materials were produced by the development team rather than the printer. In addition, all other materials for the course were secured, including nametags, table toys, sign in sheets, game boards and game pieces.

<u>Selected a logistics coordinator</u> – An experienced logistics employee was selected for this role. It was determined that a logistics coordinator was needed for the dress rehearsal session given

the large number of materials needed throughout the course. The logistics coordinator would support the facilitators by ensuring participants had timely access to materials.

Invited design team members – To advise the course presenters and gain input on what portions of the course needed revision, the design team attended the dress rehearsal session.

Invited audience members – The audience, comprised of SFA employees who were available to participate at the time, was invited to attend. The audience was not chosen in advance.

Conducted dress rehearsal – The presenters conducted the dress rehearsal session.

Gathered suggestions and comments from the audience – After completing the dress rehearsal, the audience shared comments and suggestions regarding the course.

Gathered suggestions and comments from the design team - After comments were gathered from the audience, the design team shared comments and suggestions regarding the course.

Pilot Sessions Planning

Pilot sessions allow a "test run" of course content and materials. During these sessions, the development team determines what portions of the course need to be revised. Therefore, it is beneficial to conduct a thorough and representative pilot. Front 2 Back was tested during two separate pilot sessions in Washington DC and Chicago. A regional pilot was necessary to obtain an accurate audience sample reflective of all SFA employees and operating partners. This was essential since Front 2 Back served multiple audience groups at SFA.

In Front 2 Back, creating the pilot sessions included selecting participants, securing course materials, recruiting a logistics coordinator, securing space, and gathering feedback. A more detailed description of the steps involved in creating the pilot sessions is included below.

Team Members:

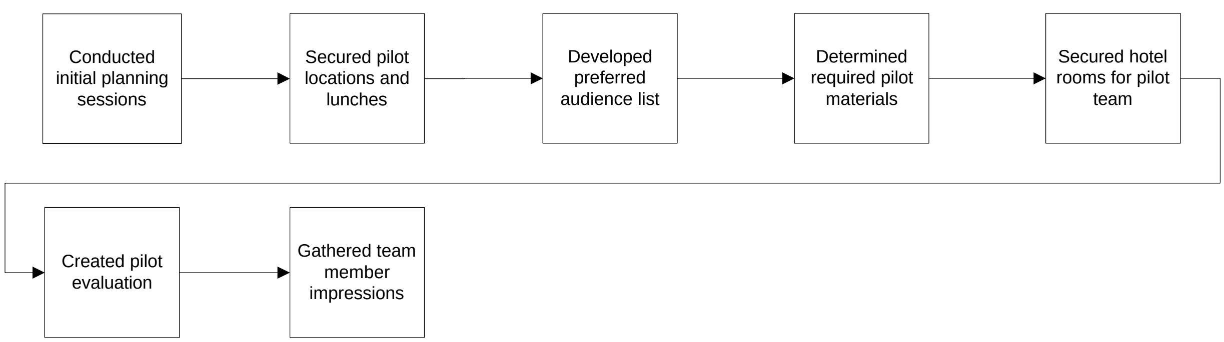
SFA

- Sarah Babson
- Pat Reese

Accenture

- Daniel Boulton
- Laura Miller

Pilot Sessions Planning Process Flow



Process Steps

<u>Conducted initial planning sessions</u> – An initial pilot planning session was held. During this meeting, the following topics were discussed: audience makeup and selection, pilot presenters and backup presenters, logistics coordinator recruitment, and team member roles.

<u>Secured pilot locations and lunches</u> – Contracts for both the pilot space and lunches were researched and finalized.

<u>Developed preferred audience list</u> –To obtain constructive feedback from the pilot sessions, a representative audience was chosen. Operating partners, regional employees, headquarters employees, and employees with differing amounts of financial aid knowledge, were included in both course pilots. The audience was selected and the employees' managers were contacted to request their participation.

Determined required pilot materials – The team arranging the pilot sessions determined what materials would be necessary based on the number of expected participants. For the regional pilots, decisions were made regarding the process to get materials to the site in a timely manner.

Secured hotel rooms for pilot team – Rooms were reserved for the team. The rooms were procured at the discounted government rate.

Created pilot evaluation – Two pilot evaluations forms were created to assess the individual sections and the overall effectiveness of the course. One evaluation was given to the audience at the beginning of the course, allowing participants to provide comments throughout the day. At the end of the session, participants completed a second evaluation that addressed the course learning objectives and alignment with the SFA University brand.

Gathered team member impressions – Following the first pilot, design team members discussed their impressions. After the second pilot, the team established a timeline and process to determine needed changes. Each team member was asked to create a list of the changes that he/she would like to see. Each item on the list was prioritized from the most pressing to least important changes.

Facilitators

Facilitator Selection Design

A critical element of a successful training course is its facilitators. To ensure the selection of skilled, knowledgeable, competent facilitators, it's important to employ a thoughtful and thorough selection process. During Front 2 Back, the opportunity to be a facilitator was extended to all SFA employees. This decision provided SFA employees an opportunity to demonstrate existing skills and build new ones.

The Front 2 Back facilitator selection design process included process design, communication planning, selection criteria creation, application screening, and auditions. A more detailed description of the steps in the facilitator selection process is included below.

Team Members:

SFA

- Midge Hunt
- Skip Pou

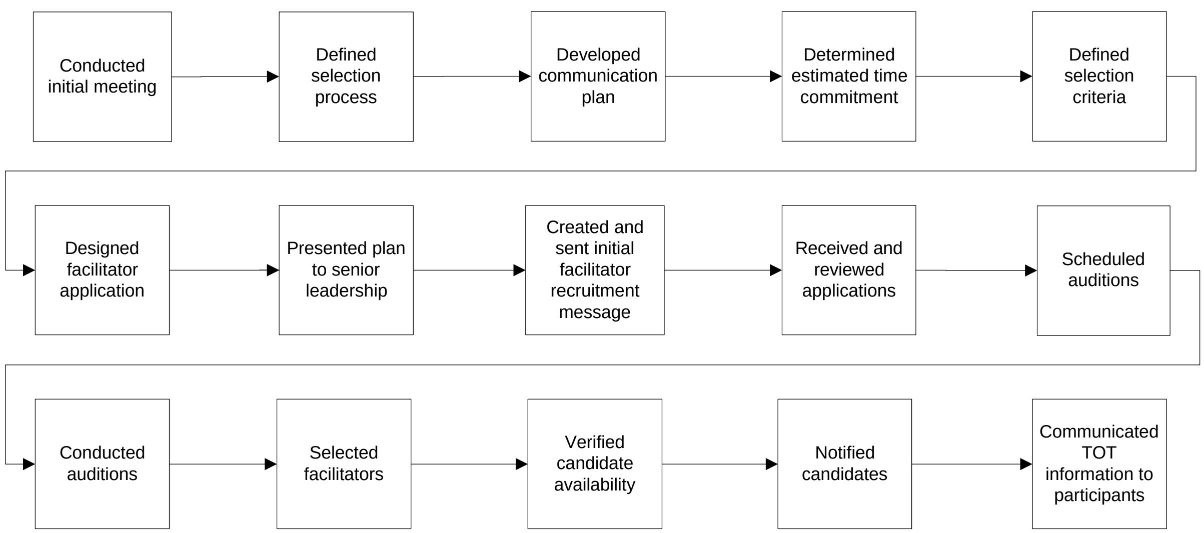
Accenture

- Daniel Boulton
- Laura Miller

PSG

- Michael Donnelly

Facilitator Selection Design Process Flow



Process Descriptions

Conducted initial meeting – During the first meeting of the facilitator selection team, an initial process flow was proposed that had been produced by one of the team members. Pros and cons for each step in the process were discussed. Follow-up meetings were necessary to refine the process.

Conducted meetings to define selection process – Several meetings were held to discuss and solidify the facilitator selection process before accepting applications. These meetings focused on all aspects of the process including sequencing of process steps, candidate selection and decision notification.

Developed communication plan – Once the selection process was determined, a communication plan was produced to inform senior leadership and management about their employees' anticipated time commitment and participation in Front 2 Back. The communication plan focused on the audience, timing, and content of each critical message.

Determined estimated time commitment – The selection team determined the time commitment required of facilitators in Front 2 Back. This commitment was the number of sessions that each facilitator would deliver.

Defined selection criteria – To consistently and fairly select facilitator candidates, the selection team produced a set of facilitator selection criteria. These included content related knowledge requirements and facilitation skills. All candidates were evaluated on these criteria.

Designed facilitator application – The facilitator selection application was created using the selection criteria the team produced. The application questions were designed to measure those criteria that the team felt a facilitator should have. The application was created by one team member and then revised and finalized by the entire team.

Presented plan to senior leadership – The facilitator selection presented its process to the senior leadership council. The team requested support from the senior leadership council, which was considered essential to the success of the process.

Created and sent initial facilitator recruitment message – An e-mail invitation was sent out to all SFA employees encouraging them to participate in Front 2 Back as facilitators. The message included application information and selection timeframes.

Received and reviewed applications – Once the applications were received, the team went through a screening process to determine preferences for facilitators.

Scheduled auditions – Upon completion of the initial application screen, candidates were contacted and auditions were scheduled. The candidates also received the audition requirements and expectations at that time.

Held auditions – The auditions were designed to test both the presentation skills and the content knowledge of the candidate. Each candidate was asked prepare and deliver a 5-minute presentation on a financial aid topic. During the audition, the candidate's presentation style, content knowledge, and other skills were assessed on an evaluation sheet.

Made selection decisions – Once the auditions were complete, the team held an offsite meeting to make final selection decisions. The committee considered both the candidate's application and audition when making its final decision.

Verified candidate availability – Before announcing selection decisions, the committee checked with the candidates' managers to ensure that facilitators would be able to fulfill the time commitment involved.

Communicated selection decisions – After the final selections were made, both selected and rejected candidates received a phone call and an e-mail informing them of the committee's decision.

Communicated TOT information to participants – Once the candidates were notified of their selection, they received information concerning the Training of Trainers (TOT) course offered to prepare them for delivering the course.

Training of Trainers (TOT) Design & Development

Just as selecting the right facilitators was important to Front 2 Back's success, so was ensuring access to a strong training program. Responsible for developing the selected facilitators was the Training of Trainers (TOT) Design & Development Team. This team sought to strengthen that the facilitators' content knowledge, presentation skills, and confidence level.

The TOT planning process involved designing the TOT curriculum, developing course modules, and implementing the TOT. A more detailed description of the steps in the TOT design and development process is included below.

Team Members

SFA

- Sarah Babson
- Stephen Blair

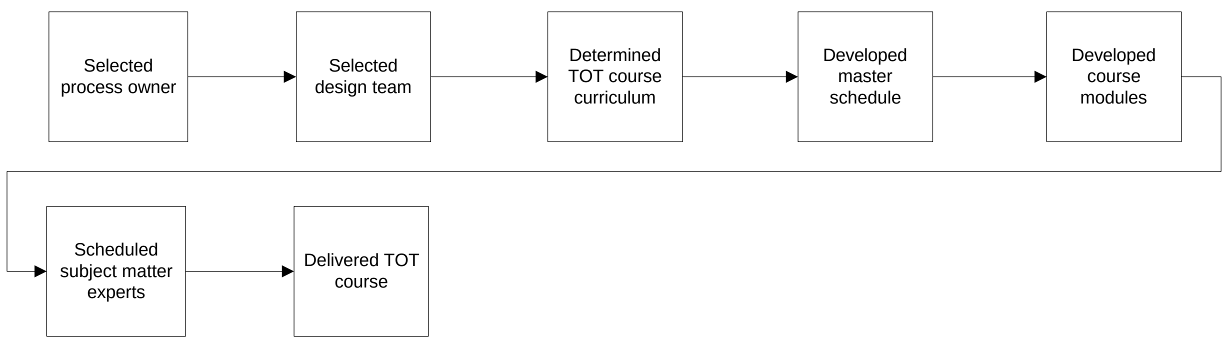
Accenture

- Laura Miller

PSG

- Michael Donnelly
- Jeff Kober

Training of Trainers Design & Development Process Flow



Process Steps

Selected process owner – Project team co-leads selected the TOT design and development process owner, who was accountable for the success of the TOT.

Selected design team – Once the process owner was selected, the rest of the TOT team was chosen. Several team members created and presented a module during the TOT.

Determined TOT course curriculum – Several team meetings were conducted to solidify the TOT course content. Discussions during the meetings covered all aspects of the TOT. The TOT course curriculum included experiencing Front 2 Back as a participant, financial aid core content, and an introduction to the SFA University brand and approach to training design and development.

Developed master schedule – Upon determining the course curriculum, the process owner produced a master schedule. This schedule served as a blueprint for the rest of the development and planning.

Developed course modules - Team members worked individually on the TOT modules. There was little team interaction during this time in the process except between the process owner and individual team members.

Scheduled subject matter experts – Subject matter experts were contacted and asked to represent their organization during the subject matter expert day.

Delivered TOT course – The TOT course was delivered.

Facilitator Support

After the facilitators were selected and trained, they were provided additional support from SFA University. This coaching hones the facilitators' presentation skills and increases confidence in course delivery. During Front 2 Back, facilitator support took the form of coaching and a monitored discussion via e-mail.

Team members:

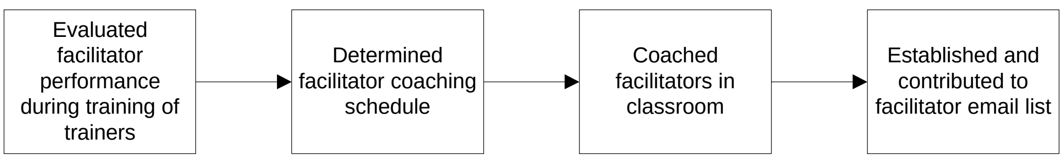
Accenture

- Susan Gottlieb
- Katie Malague

PSG

- Michael Donnelly

Facilitator Support Process



Process Steps

<u>Evaluated facilitator performance during training of trainers</u> – To determine which of the facilitators would benefit most from performance coaching, all of the facilitators were evaluated during the training of trainers sessions. The evaluation consisted of observations about the facilitator's content knowledge and presentation skills by an expert coach.

<u>Determined facilitator-coaching schedule</u> – Using the evaluations from the training of trainers, the expert facilitator coach developed a coaching schedule.

<u>Coached facilitators in classroom</u> – Each SFA facilitator, and operating partners who requested it, received coaching during and after their Front 2 Back sessions. The coach observed a facilitator's session, documented strengths and areas for improvement, and provided suggestions.

<u>Established and contributed to facilitator e-mail list</u> – An e-mail list was established for facilitators to share lessons learned with each other after the training of trainers. Members of the design team monitored the e-mail list closely to provide assistance when necessary.

Logistics Coordinators

Logistics Coordinator Selection

When delivering a highly complex training course, quality logistics coordinators enhance the session's success. To ensure the selection of dependable and competent logistics coordinators, it's important to employ a thoughtful and thorough selection process. During Front 2 Back, the opportunity to be logistics coordinators was extended to all SFA employees. This decision provided SFA employees an opportunity to build new skills.

The Front 2 Back logistics coordinator selection process included process design, communication planning, selection criteria creation and application screening. A more detailed description of the steps in the logistics coordinator selection process is included below in chronological order.

Team Members

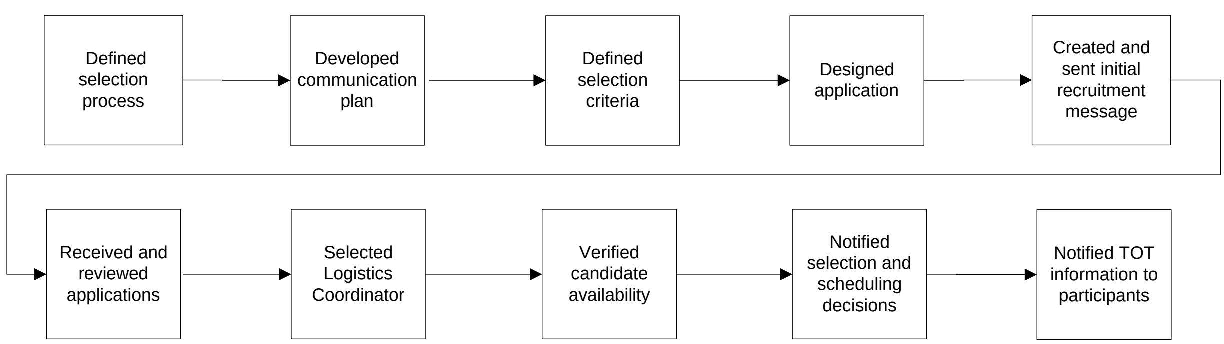
SFA

- Scarlet Brock
- Anita Gross
- Pat Reese
- Vicki Wilson

Accenture

- Daniel Boulton

Logistics Coordinator Selection Process Flow



Process Steps

<u>Conducted initial meeting to define selection process</u> – During the first meeting of the Logistics Coordinator selection team, an initial process flow was proposed. This process was discussed and revised throughout the meeting. At the conclusion of the meeting, the team accepted the process and determined next steps.

<u>Developed communication plan</u> – Once the selection process was decided upon, a communication plan was produced to ensure that senior leadership and management received important messages about their employees' anticipated time commitment and participation in

Front 2 Back. The communication plan focused on the audience, timing, and content of each message.

Defined selection criteria – To select logistics coordinators in a fair and consistent way, the team produced a set of selection criteria. These criteria were used to evaluate all candidates.

Designed application – The logistics coordinator application was created using the selection criteria the team produced. The application questions measured the established criteria. One team member created the application, which was then revised and finalized by the team.

Created and sent initial recruitment message – An e-mail invitation was sent to all SFA employees encouraging them to participate in Front 2 Back as logistics coordinators. The message included application information and selection timeframes.

Received and reviewed applications – Once the applications were received, the team screened them to determine preferences for logistics coordinators.

Made selection decisions – Once the applications were evaluated, the team held a meeting to make final selection decisions. The evaluations of individual applications were considered against the rest of the group. Finally, the committee selected logistics coordinators.

Verified candidate availability – Before announcing selection decisions, the committee checked with each candidate's manager to ensure they would be able to fulfill the time commitment involved with being a logistics coordinator.

Communicated selection and scheduling decisions – After the final selections were made, all candidates received an e-mail informing them of the committee's decision.

Communicated TOT information to participants – Once the candidates were notified of their selection, they were contacted with information concerning the training course that would prepare them for supporting the course.

Logistics Coordinator Training Design and Development

In a logistically complex training program, it is important that logistics coordinators receive thorough training. During Front 2 Back, logistics coordinators were brought into the last three days of the training of trainers course to learn about their role. Through this they were given the opportunity to familiarize themselves with their tasks and become comfortable with their responsibilities.

The logistics coordinator training design and development team created the course curriculum, developed an agenda, and created course materials. A more detailed description of the steps in the logistics coordinator selection process is included below.

Key Participants

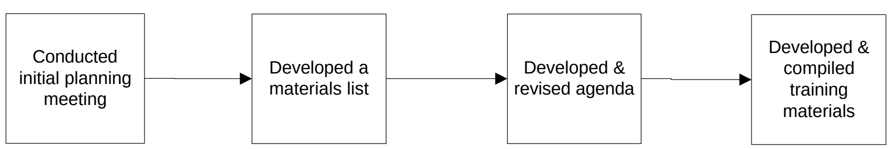
SFA

- Stephen Blair
- Vicki Wilson
- Pat Reese

Accenture

- Daniel Boulton
- Laura Miller

Logistics Coordinator Training Design and Development Process Flow



Process Steps

<u>Conducted initial planning meeting</u> – An initial meeting was held to determine the logistics coordinators' training needs and learning objectives for the course.

<u>Developed a materials list</u> – A materials list was drafted that included an agenda, a facilitator guide, room layouts for Portals and hotels, a course outline including specific tasks, a master checklist, and an "in case of emergency" flier.

<u>Developed and revised agenda</u> – An agenda was created and revised for the program. Responsibility for creating and delivering sections of the program was assigned to the different team members.

<u>Developed and compiled training materials</u> – The team developed a logistics coordinator notebook that included all of the logistics coordinator materials. This included checklists, course outlines, emergency contact sheets, and other materials.

Logistics Coordinator Support

After logistics coordinators are selected and trained, it's important to provide continued support from SFA University. This support increases the logistics coordinators' confidence in their roles. During Front 2 Back, logistics coordinator support took the form of coaching and a logistics coordinator e-mail list. A more detailed description of the steps involved logistics coordinator support is included below.

Team members:

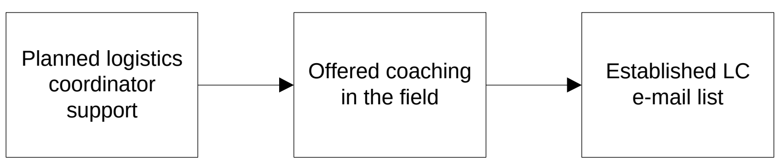
SFA

- Len Clark
- Pat Reese
- Vicki Wilson

Accenture

- Daniel Boulton

Logistics Coordinator Support Process Flow



Process Steps

Planned logistics coordinator support – Created plan to provide expert coaching during the logistics coordinators' first live sessions. This was provided because of the complexity of the logistics necessary to support Front 2 Back.

Offered coaching in the field – Most logistics coordinators received coaching during and their Front 2 Back sessions.

Establish logistics coordinator e-mail list – An e-mail list was established for logistics coordinators to share lessons learned with each other after the training of trainers. When a logistics coordinator learned something about effective course delivery or had a specific concern, they would send a message to the group. In this way, the logistics coordinators experience in Front 2 Back aided their peers.

Logistics

Event Planning Firm Selection

During Front 2 Back, space in the Portals Building was used for DC sessions and hotel space was used for regional sessions. To procure space in the regions, an event planner was utilized. In evaluating event planners, the team focused on service quality, price, and previous experiences with that company.

During Front 2 Back, the event planner selection team determined the logistical requirements of Front 2 Back, created questions to ask the event planner, analyzed bids, and created and implemented a contingency plan. A more detailed description of the steps involved in the event planner selection process is included below.

Team Members:

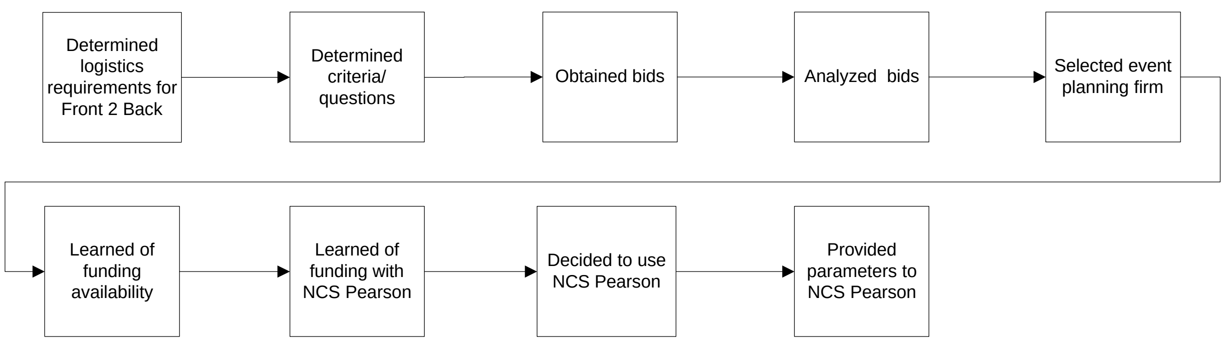
SFA

- Vicki Wilson

Accenture

- Daniel Boulton
- Laura Miller

Event Planning Firm Selection Process Flow



Process Steps

<u>Determined logistics requirements for Front 2 Back</u> – The number of sessions needed in the regions, the number of lunches provided, and other logistical details were determined for the event planner.

<u>Determined criteria/ questions</u> – Based on the logistics requirements for the class, the team created questions and criteria for initial conversations with event planning firms.

<u>Obtained bids</u> – After contacting event planning firms, several bids were submitted and received.

<u>Analyzed bids</u> – The bids were analyzed based on level of service, cost, and willingness to address the initial logistics parameters.

Selected event planning firm – After the bids were analyzed, an event planning firm was selecting.

Learned of funding availability – SFA University's budget was frozen, due to a change in administration, complicating the contract process.

Learned of funding with NCS Pearson – While a contingency plan was being created, an existing contract with NCS Pearson allowed for event arrangements to proceed.

Decided to use NCS Pearson – Because of the existing contract, NCS Pearson was selected as the event planner for Front 2 Back.

Provided parameters to NCS Pearson – The initial logistics parameters created for the event planning firms were given to NCS Pearson to use in arranging the sessions.

Kit Production

To aid the delivery of Front 2 Back in regional office locations, kits including all of the course materials were produced and shipped. As the course materials arrived, SFA University employees separated out batches for each to the regional locations. Once all of the materials had been assembled and checked, the shipments were sent to the regional locations.

The kit production team was responsible for developing a materials spreadsheet, developing kit checklists, and producing the kits. A more detailed description of the steps involved in kit production is included below.

Team Members

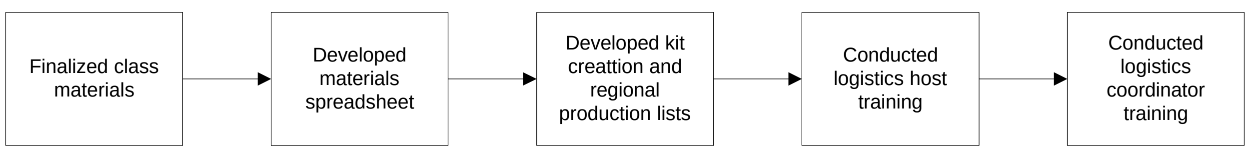
SFA

- Pat Reese
- Vicki Wilson

Accenture

- Daniel Boulton

Kit Production Process Flow



Process Steps

<u>Finalized class materials</u> - The team gathered the required course materials. Based on the number of classes that would be held in the regions, a total number of materials was determined.

<u>Developed materials spreadsheet</u> - Initially, a spreadsheet was developed to determine items that would be necessary to complete one Front 2 Back class. The next step was to determine how many of the items could be re-used in multiple classes to reduce cost.

<u>Develop kit creation and regional projection lists</u> - From the materials spreadsheet, a "Kit List" was created. This kit list represented the final account of what was needed to present one Front 2 Back class. The regional projection list was created by multiplying the number of the items needed for one class by the number of sessions held in that particular location. Based on these projected needs for all courses in a particular location, site specific shipments were created containing all of the necessary training items. Once these larger shipments arrived, the "Kit List" was used to assemble a set of items for use in each training class.

<u>Conducted logistics host training</u> - Each Logistics Host was contacted, via fax and/or telephone, and was walked through the process for delivery and storage of class items. Once the items were received, they were to be stored until the last session of Front 2 Back at each location was

held. In coordination with the Logistics Coordinator, the "Kit List" was to be used to create the necessary package of items needed for each class.

Conducted logistics coordinator training - Each Logistics Coordinator attended a training session held in Washington, DC May 9, 10 and 11 in Washington, DC. During this training session, each of the LCs was exposed to the Front 2 Back course, the LC role, and how to create of a set of training materials for each class based on the "Kit List."

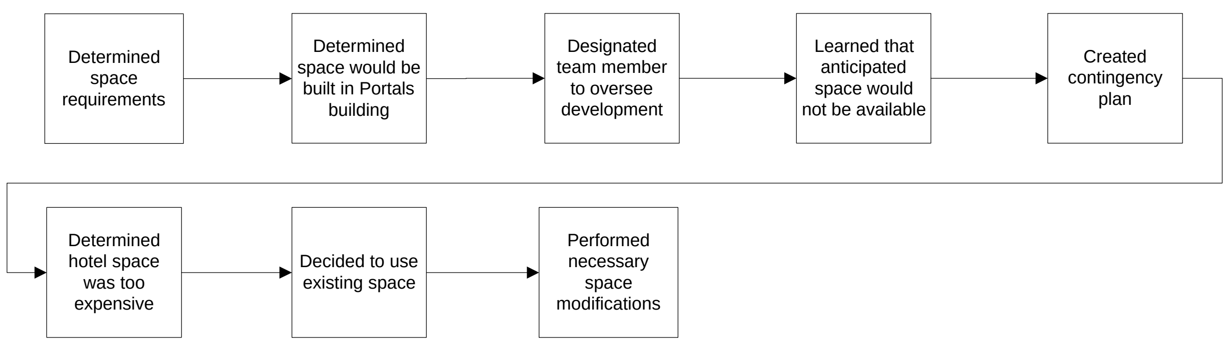
Space Planning

The space planning team procured space for the headquarters sessions of Front 2 Back. They determined space requirements; oversaw space development; and created and executed a contingency plan. A more detailed description of the steps involved in space planning is included below.

Team Members:
SFA
- Carolyn Craddock
- Pat Reese
- Vicki Wilson

Accenture
- Daniel Boulton
- Laura Miller

Space Planning Process Flow



Process Steps

Determined space requirements – The space planning team researched the specifications for the space that would be needed for Front 2 Back.

Determined space would be built in portals – After deciding what size and type of space needed for Front 2 Back, the team decided that some available space in first floor of the Portals building would be suitable.

Designated team member in charge of overseeing development – One team member was designated to oversee the development of the space. This included dealing with the contractors in charge of space modification.

Learned that anticipated space would not be available – The team member in charge of space development learned that the Portals building space would not be developed or funded for the launch of Front 2 Back.

Contingency plan created – A contingency plan was proposed that involved procuring Washington DC hotel space.

<u>Determined hotel space was too expensive</u> –The high cost of Washington DC hotel space proved prohibitive, therefore requiring changes in the contingency plan.

<u>Decided to use existing space</u> – The “War and Peace” room in Portals was chosen as an affordable substitute for hotel space.

<u>Performed necessary space modifications</u> – Before the course began, the room outside of the “War and Peace” room was modified to serve as a reception room and lounge for course participants. In addition, the “War and Peace” room was soundproofed and painted. Chairs, tables, a sound system, and corkboards for the walls were also procured.

Materials

Materials Shipping & Printing Process

To enable timely course delivery, printing and shipping schedules were established and communicated to the development team. During Front 2 Back, the shipping and printing schedules resulted in course materials being received promptly at the training locations.

To achieve this result, the shipping and printing team determined printing items, established printing schedules, and worked with the printer to ensure timely delivery of materials. A more detailed description of the steps involved in kit production is included below.

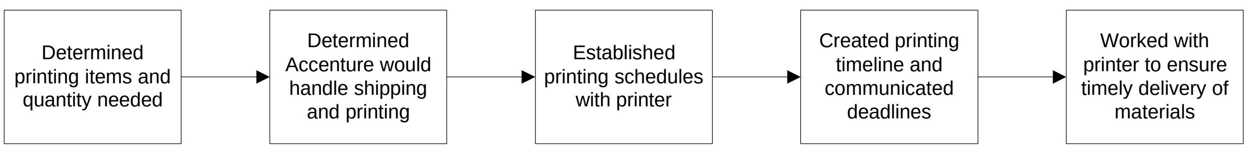
Team Members:
SFA

- Pat Reese

Accenture

- Daniel Boulton

Materials Shipping & Printing Process Flow



Process Steps

Determined printing items and quantity needed – The shipping and printing team researched printing needs and quantities.

Determined Accenture would handle shipping and printing – It was determined that Accenture would be exclusively responsible for working with the printer to deliver the Instructor Guides, Presenter Guides, Life Event Administrator Guides, Learning Administrator Guides, and Data CD's.

Worked with printer to establish printing schedules – A schedule was negotiated with the printer. The printing schedule ensured that the materials would be delivered on time.

Created printing timeline and communicated deadlines – From the dates negotiated with the printer, a printing timeline was established and the specific printing dates were shared with the design and development teams. Informing key stakeholders about printing dates helped meet those deadline dates.

Worked with printer to ensure timely delivery of materials – Accenture documented its expectations for printing and delivery of items and provided documentation in writing to the printer at each step of the process. A memorandum was created detailing every expectation and due dates for each piece to guarantee clarity and on time delivery.

Course Giveaway

During Front 2 Back, course giveaways were provided to course participants. The giveaways remind the participants of what they learned in the course after they are finished with the training. For the course giveaways to be truly effective, the items had to be useful to the course participants. With that goal in mind, the course giveaway process included selecting giveaways, creating a detailed giveaway outline, ordering items, and packing the items for shipping. A more detailed description of the steps involved in selecting and procuring course giveaways is included below.

Team Members:

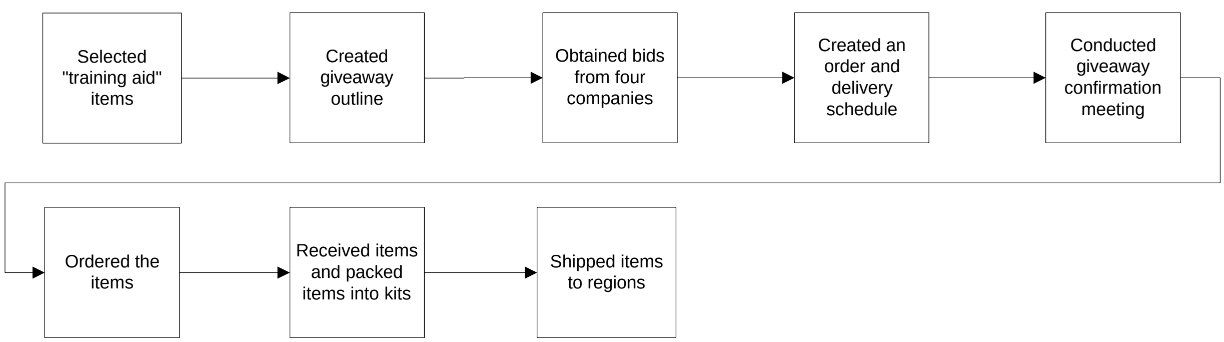
SFA

- Sarah Babson
- Pat Reese

Accenture

- Daniel Boulton
- Laura Miller
- Michael Ungari

Course Giveaway Process Flow



Process Steps

<u>Selected "training aid" items</u> – Once the decision was made to provide course giveaways, a course giveaway selection meeting was held where members of the design team could state their preferences. After the meeting, one member of the team finished the selection process with the team's preferences in mind. This individual made the final giveaway selections and created the budget.

<u>Created giveaway outline</u> – Once the giveaway's were decided upon, a detailed outline was created with the per-class and course-wide totals for each of the giveaways.

<u>Obtained bids from four companies</u> – To obtain the most cost-effective price for the course giveaways, several bids were obtained.

<u>Created an order and delivery schedule</u> – To ensure timely delivery of the selected items, an order and delivery schedule was created that would be submitted to the selected vendor.

<u>Conducted giveaway confirmation meeting</u> – A final meeting was held to confirm agreement on the giveaways selected before orders were placed.

<u>Ordered the items</u> – Once confirmed by the team, the items were ordered.

<u>Received and packed items into kits</u> – As the items were received from the vendors, they were separated and packed into shipments for the regions.

<u>Shipped items to regions</u> – Once the batches were complete, they were shipped to the regional training locations.

Music Selection

In accordance with the SFA University Brand, the design team decided that music should be played in the background during certain portions of Front 2 Back. The music was used while participants initially came into the training room, during lunch, and during breaks. The music was upbeat but not obtrusive. To achieve this goal, the music selection process involved creating templates and criteria, and conducting music selection meetings. A more detailed description of the steps in the music selection process is included below.

Team Members:

SFA
- Sarah Babson
- Pat Reese

Accenture
- Susan Gottlieb
- Laura Miller
- Katie Malague
- Michael Ungari

Music Selection Process Flow

Scheduled initial meeting → Created music selection template & criteria → Conducted music selection meeting → Researched music procurement → Purchased music for course

Process Steps

Scheduled initial meeting – Team members were chosen and the initial music selection meeting was scheduled. Included in the meeting invitation for the meeting was a request that all of the team members bring in music selections they felt would be appropriate for Front 2 Back. Participants were each asked to bring in at least 2 musical selections.

Created music selection template and criteria – To standardize the music selection process, a template and selection criteria were created. The template included space to rate and comment on each music selection. The selection criteria were general guidelines to determine how well the music would fit in Front 2 Back.

Held music selection meeting – During the music selection meeting, participants played a few songs from each album. This gave the group a sample of each selection. After all of the chosen selections from the album were played, the group rated the selection. At the end of the meeting, after all the selections had been played and rated, the team compared rankings and chose an album for Front 2 Back.

Researched music procurement – Once the album was chosen, a member of the music selection team was responsible for researching prices at a number of different vendors.

Purchased course music – The lowest price vendor was selected and the music was purchased.

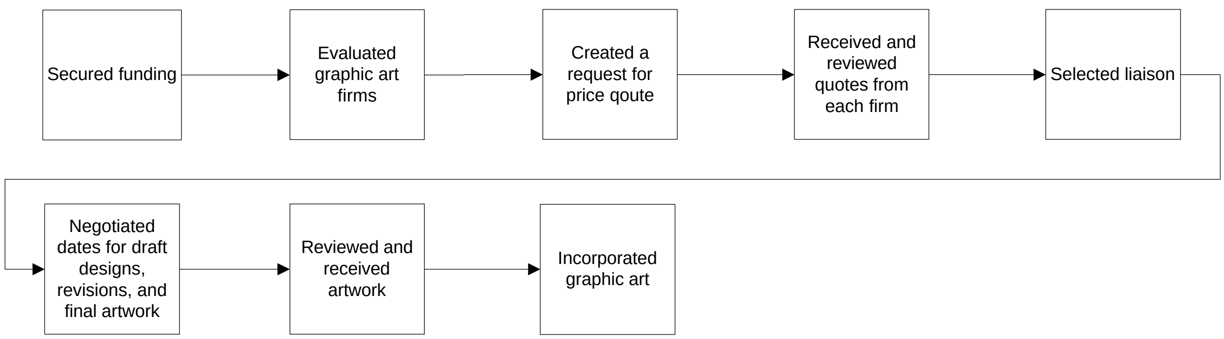
Graphic Artist

Some of the materials used during Front 2 Back utilized artwork created by a graphic artist. Team members selected the artist, negotiated draft and acceptance dates, and reviewed the artwork. A more detailed description of the steps involved in using a graphic artist is included below.

Team Members:
SFA
- Anita Gross

Accenture
- Susan Gottlieb
- Laura Miller

Graphic Artist Process Flow



Process Steps

Secured funding – Funding to pay for the services of the graphic artist was secured from the channels.

Evaluated graphic art firms – Several graphic art firms provided examples of their previous work and were interviewed by design team members.

Created a request for price quote – To further evaluate the graphic art firms, a request for a price quote was submitted to the graphic art firms.

Received and reviewed quotes from each firm – The price quotes were received and reviewed. One firm was chosen based on the evaluation of the quotes and the previous interview.

Selected liaison – A development team member served as liaison between the graphic artist and the design team.

Negotiated dates for draft designs, revisions, and final artwork – To ensure the timely delivery of the course artwork, a schedule for art drafts, revisions and final submissions was negotiated and established.

Reviewed and received artwork – In compliance with the submission schedule, the graphic art was received, reviewed, and accepted by the development team.

Incorporated graphic art – The graphic art was incorporated in the Front 2 Back materials.

Project Management

Status Meetings

During Front 2 Back, all of the process leaders would meet once weekly for a status meeting. This served as an important communication tool. One of the Front 2 Back team leads would create an agenda and facilitate each meeting. During the meeting, team members would update the rest of the group on progress and present any issues in their area. Also, general status and issues that affect the whole project were discussed. Major accomplishments, issues, and action items raised during each meeting were captured and incorporated into meeting notes. The meeting notes were sent to all meeting participants via e-mail after each meeting. After Front 2 Back was implemented, the status meetings became less frequent, happening every two to four weeks.

Key Participants:

SFA

- Sarah Babson
- Stephen Blair
- Anita Gross
- Midge Hunt
- Pat Reese
- Vicki Wilson

Accenture

- Daniel Boulton
- Susan Gottlieb
- Laura Miller

PSG

- Michael Donnelly

Operating Partners

SFA employees and operating partners work together to accomplish their tasks. As a result, Front 2 Back was delivered to both groups concurrently. Because operating partners are not SFA employees, an operating partner involvement team negotiated each operating partner's involvement.

Organizing operating partner cooperation involved communicating with multiple stakeholders, providing course materials, providing access to the registration system, and contacting operating partner managers. A more detailed description of the steps involved in operating partner involvement is included below.

Team Members:

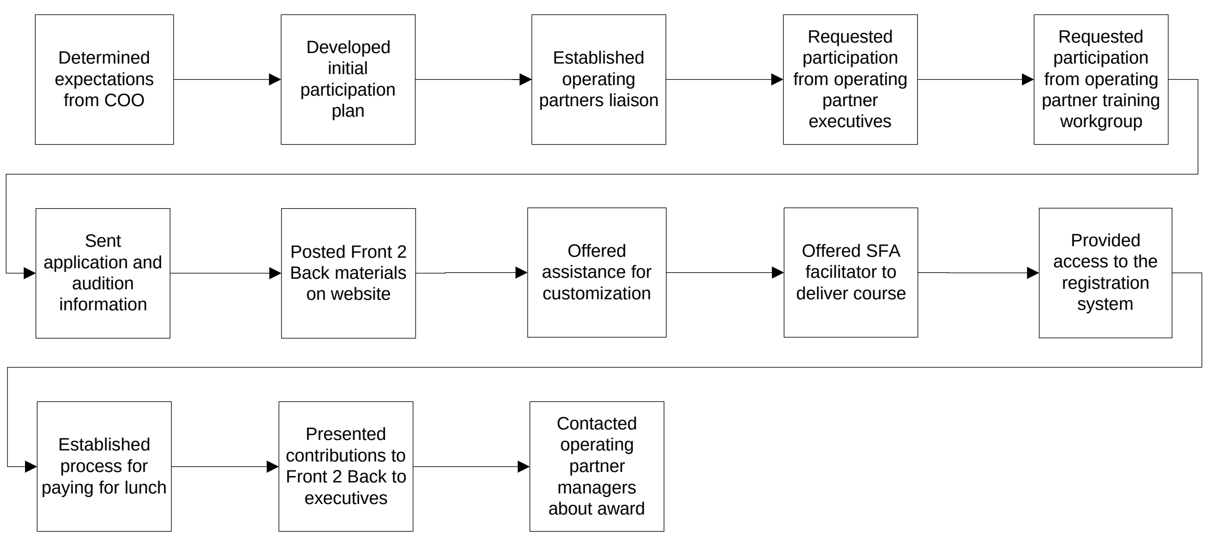
SFA

- Sarah Babson

Accenture

- Daniel Boulton
- Laura Miller

Operating Partners Process Flow



Process Steps

Determined expectations from COO – Early in the process, SFA's COO informed the Front 2 Back design team that the course would be delivered to both operating partners and SFA employees concurrently. Also, operating partners would be asked to be facilitators and logistics coordinators and thereby deliver the course with their SFA counterparts.

Developed initial participation plan – The team created an initial plan for operating partner involvement. This plan included having each operating partner: sponsor an employee as a facilitator, participate in the pilots, and participate in the main course.

Established operating partners liaison – To ensure that messages to operating partners were clear and consistent, a single liaison from SFA University, Sarah Babson, was established to be point of contact.

Requested participation from operating partner executives – The initial plan for involvement was discussed with the operating partner executives. A date by which operating partners had to respond to SFA's proposal was established.

Requested participation from operating partner training workgroup – The SFA request for operating partner involvement was shared at the monthly training workgroup. Course storyboards were presented to members of this group to inform about the course design.

Sent application and audition information – Information about the application and audition process was distributed to operating partners for their employees. Those interested in participating completed applications and auditions. Employees who were selected attended the training of trainers course alongside their SFA counterparts.

Posted Front 2 back materials on website – Materials from Front 2 Back were posted to the SFA University website, which was accessible to operating partners. This access enabled operating partners to customize the materials based on their employees' needs.

Offered assistance for customization – During the training of trainers course, the Front 2 Back design team offered to help operating partners customize the course materials for their employees.

Offered SFA facilitator to deliver course – Operating partners were offered the opportunity to request a facilitator from SFA to assist with the delivery of the course at the operating partners' location. For example, a trainer from SFA University was designated to work with AFSA for several weeks to deliver the course.

Provided access to the registration system – Access to the course registration system was provided to operating partners, enabling them to register for Front 2 Back session arranged by SFA.

Established process for paying for lunch – Due to regulations, SFA University was unable to pay for operating partner lunches. Therefore, a process was created for operating partners to determine the total number of people they would send to SFA sponsored sessions and the resulting cost for lunch.

Presented contributions to Front 2 Back to executives – During an operating partner executives meeting, SFA University representatives highlighted the contribution of the operating partners to the success of Front 2 Back.

Contacted partner managers about reward – SFA employees who volunteered to facilitate Front 2 Back received a performance award after the completion of the program. Because operating partners were not eligible for this award, the managers of those who facilitated were contacted to explain the situation and encourage recognition of operating partner facilitators.